

Gixo Business User Guide



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What is Gixo Business?

Gixo Business is a document-grounded workspace that turns uploaded source documents into structured business artifacts. Unlike generic AI summarizers, every output is rooted in the material you provide — briefs, decks, recommendations, decisions, and frameworks are all grounded in your files.

One source pack. Five business modes.

Upload contracts, reports, research, or internal notes and turn them into the business artifact the job actually needs.

Getting Started

CREATING YOUR ACCOUNT

1. Subscribe through the Azure Marketplace or gixo.ai/products/business
2. Sign in or create an account using your work email
3. Your subscription activates automatically
4. Begin creating business briefs immediately

YOUR FIRST BRIEF

1. Navigate to **Gixo Business** from the dashboard
2. Click **Open Brief Mode**
3. Describe what you want to create
4. Upload your source files
5. Choose a brief recipe

6. Click **Create Brief**

The Five Business Modes

All five modes start from the same uploaded source documents. Evidence, citations, and review stay connected across every mode.

1. BRIEF MODE

The core starting point. Create checked summaries with key findings, source notes, and next steps.

When to use: You need a scannable summary — a meeting prep brief, a proposal summary, or an executive update — grounded in uploaded files.

Workflow:

1. **Describe the work** — Write what you need in plain language (e.g., "Create a meeting brief for a prospect call tomorrow")
2. **Choose or create a workspace** — Workspaces hold reusable source documents, settings, and generated outputs
3. **Upload source files** — Drag and drop PDFs, Word documents, spreadsheets, or text files
4. **Select a brief recipe** — Choose from 54 templates organized into five categories (see Brief Recipes below)
5. **Configure settings** — Set audience, tone, detail level, and additional context
6. **Generate** — Gixo reads your sources, checks facts, adds citation notes, and builds the brief
7. **Edit and refine** — Move sections, rewrite paragraphs, or use AI-assisted editing without regenerating
8. **Export or share** — Download as PDF or DOCX, or share a read-only link

2. BRIEFING DECK MODE

Extend your brief sources into a grounded, source-linked presentation.

When to use: Your team needs to present findings to stakeholders or a board, and the deck must stay tied to source evidence.

Workflow:

1. Start from a Brief Mode source pack
2. Build an advanced presentation structure
3. Maintain evidence links and citations across slides
4. Generate a themed slide deck
5. Export as PPTX for external editing

3. RECOMMENDATION MODE

Compare options, surface trade-offs, ask clarifying questions, and build a decision-ready recommendation draft.

When to use: The work needs more than a summary — when options, trade-offs, and follow-up questions matter.

Workflow:

1. **Upload documents** — Start from reports, proposals, research, or working files that frame the decision
2. **Set the decision** — Explain what needs deciding, what options exist, what matters most
3. **Compare options** — Options are made visible instead of collapsed into a generic summary
4. **Fill gaps** — Gixo asks for missing inputs rather than guessing
5. **Review the draft** — Get a recommendation with rationale, ready to refine
6. **Link to artifacts** — Connect the recommendation to decision and framework work

4. DECISION ARTIFACTS

Structured evaluative surfaces for board-ready, audit-grade decision documentation.

When to use: You need explicit options, criteria, confidence levels, and trade-offs laid out — not a narrative.

Design principle: Would this survive three minutes of hostile board questioning?

Workflow:

1. Upload source materials
2. Choose a decision layout (see Decision Layouts below)
3. Frame options, criteria, or the scenario

4. Set confidence level and risk assessments
5. Export with your preferred theme
6. Share or embed in board decks

Decision Layouts:

LAYOUT	PURPOSE	BEST FOR
Decision Matrix	Multi-criteria evaluation with options as columns	Vendor selection, technology evaluation, hire decisions
Options Comparison	Side-by-side feature comparison	Build vs buy, platform comparison, strategy options
Weighted Scorecard	Numerical scoring model	RFP scoring, investment models, candidate evaluation
Risk/Impact Grid	Probability vs impact assessment	Project risk, strategic risk, operational risk
Go/No-Go	Binary decision with checklist criteria	Launch readiness, compliance gates, investment approval
Scenario Table	Multiple futures with implications	Strategic planning, market scenarios, contingency planning
Trade-off Matrix	Explicit trade-off enumeration (gain vs give up)	Strategic trade-offs, resource allocation, prioritization
Recommendation Summary	Single recommendation with full rationale	Executive summary, board recommendation, final proposal

Decision features:

- ▶ Confidence level indicator (Low / Medium / High)
- ▶ Go/No-Go verdicts derived from criteria, not authored
- ▶ Board-ready badges
- ▶ Audit-grade structure

- Theme selection for visual consistency

5. FRAMEWORK ARTIFACTS

Consulting-grade thinking surfaces — matrices, pyramids, funnels, and other spatial reasoning tools.

When to use: You need to structure analysis visually, where position encodes meaning.

Design principle: Would a McKinsey consultant tolerate this in a board deck?

Workflow:

1. Upload source materials
2. Choose a framework layout (see Framework Layouts below)
3. Fill structural elements (cells, nodes, segments, layers)
4. Set symmetry requirements
5. Export with your preferred theme
6. Share or embed

Framework Layouts:

TYPE	LAYOUTS	EXAMPLES
Matrix	2x2 Matrix, 3x3 Matrix	BCG Matrix, Eisenhower Matrix, GE-McKinsey Matrix
Flow	Funnel, Flywheel, Value Chain	Sales funnel, AIDA model, Amazon flywheel, Porter's Value Chain
Hierarchy	Pillar Model, Layered Stack, Hierarchy Tree, Pyramid	Strategic pillars, technology stack, org chart, Maslow's hierarchy
Assessment	Capability Map, Maturity Model	Skills matrix, tech radar, CMMI, digital maturity
Relationship	Venn Diagram, Concentric Circles, Balance Scale	Overlap analysis, stakeholder rings, opposing forces

Framework features:

- ▶ Symmetry enforcement (Strict or Flexible)
 - ▶ Asymmetry warning badges
 - ▶ Single fixed canvas — no scrolling
 - ▶ Position encodes semantic meaning
 - ▶ Cannot be regenerated (structures are deliberate)
-

Brief Recipes

Gixo Business includes 54 brief recipes organized into five categories. Each recipe defines the structure, word count, and expected file types.

SALES AND ACCOUNTS (12 RECIPES)

RECIPE	PURPOSE	WORD RANGE
Company Background Sheet	Quick profile from website or documents	300-600
Meeting Brief	Attendee context, goals, suggested questions	300-500
Proposal Summary	Plain-language summary of a business proposal	300-600
Renewal Brief	Key renewal factors and negotiation points	300-600
Pricing Options Note	Analysis of pricing models and trade-offs	250-500
Objection Answers	Common objections and prepared responses	250-400
Competitor Snapshot	Competitive positioning and differentiation	300-600
Buyer Approval Note	Key approvers and decision criteria	250-400
Mutual Plan Outline	Joint growth or service roadmap alignment	300-500
RFP Response Map	Structure for RFP response organization	300-600
Follow-up Email Set	Series of post-meeting follow-up emails	250-400
Territory Snapshot	Market overview, competition, and opportunity	300-600

MARKETING AND COMMUNICATIONS (16 RECIPES)

RECIPE	PURPOSE	WORD RANGE
Audience One-Pager	Target buyer profile and messaging	250-400
Problem Brief	Problem definition and target pain points	300-600
Benefits Sheet	Product benefits mapped to problems	250-400
Message Ideas	Core messaging themes and talking points	300-500
Web Page Outline	Structure for web page content	300-600
Blog Outline	Blog post outline with structure and flow	300-600
Customer Story Draft	Case study or customer success story	500-1200
Event Talking Points	Discussion points for events or conferences	300-600
Webinar Plan	Webinar content outline and flow	500-1200
Social Post Set (B2B)	Series of LinkedIn and social posts	250-400
Email Campaign Draft	Multi-email campaign outline	500-1200
Partner Announcement	Joint partner announcement copy	300-600
Press Note	Press release or news note	250-500
FAQ Sheet	Frequently asked questions and answers	300-600
Release Note	Customer-facing product release notes	250-500
Short Video Script	Script for short explainer video	250-400

FINANCE, STRATEGY, AND OPERATIONS (12 RECIPES)

RECIPE	PURPOSE	WORD RANGE
Business Case Summary	Business case for investment or initiative	500-1200
ROI / Cost Note	Analysis of ROI and cost implications	300-600
Budget Request Note	Budget request with justification	300-600
Spend Justification	Justification for expenditure	300-500
Vendor Comparison Note	Vendor evaluation and comparison	300-600
Contract Summary	Summary of contract key terms	250-500
Month-End Variance Note	Financial variance analysis	300-600
KPI Trend Note	Key performance indicators and trends	300-600
Risk and Issues Summary	Risk and issue assessment	300-600
Project Update Note	Project status and milestones	300-600
Quarterly Review Story	Quarterly business review narrative	500-1200
Savings Ideas List	Cost savings opportunities	300-600

PRODUCT, SUPPORT, AND LEGAL (10 RECIPES)

RECIPE	PURPOSE	WORD RANGE
Requirement Summary	Product or feature requirements	300-600
Problem Report Summary	Bug or issue report	250-500
How-to Guide Draft	User guide or documentation	500-1200
Support Playbook Note	Customer support playbook or process	300-600
Change Log Summary	Summary of changes or updates	300-600
Privacy and Data Note	Privacy or data governance notes	300-600
Terms Summary	Summary of terms or policies	300-600
Onboarding Guide Outline	Onboarding process outline	300-600
Training Lesson Outline	Training lesson structure	500-1200
Incident Review Summary	Post-incident review and learnings	300-600

EXECUTIVE AND STRATEGY (4 LONG-FORM RECIPES)

RECIPE	PURPOSE	WORD RANGE
Executive Brief	Comprehensive executive summary	2,000-5,000
Strategy Brief	Strategic analysis and recommendations	2,000-4,000
Market Deep Dive	Market analysis and opportunity assessment	3,000-5,000
Board Update	Board-ready update and strategic narrative	2,000-3,000

Workspaces

A workspace is your container for source documents, generated artifacts, and team settings.

WHAT A WORKSPACE HOLDS

- ▶ Source documents (uploaded files with extracted text and metadata)
- ▶ Generated briefs, decisions, frameworks, and decks
- ▶ Workspace settings (audience, tone, guidelines)
- ▶ Team access and sharing controls
- ▶ Document history and versions

WORKING WITH SOURCE DOCUMENTS

Supported file types: PDF, DOCX, TXT, HTML, CSV, XLSX, ICS, EML

Maximum file size: 10 MB per file

Key features:

- ▶ Full text extraction with OCR support
- ▶ Duplicate file detection

- ▶ Persistent storage across all modes — upload once, use across briefs, recommendations, decisions, and frameworks
- ▶ Remove individual documents from a workspace without affecting other files

MULTI-MODE REUSE

The same source pack drives all five business modes. Upload your files once and generate:

- ▶ A brief for your team
- ▶ A recommendation draft for leadership
- ▶ A decision matrix for the board
- ▶ A framework artifact for strategic analysis
- ▶ A briefing deck for stakeholder presentations

Evidence and citations stay centralized across every mode.

| Team Collaboration

Teams are available on Business and Enterprise plans.

ROLES

ROLE	WHAT THEY CAN DO
Owner	Full control over the team
Admin	Manage team members and settings
BillingAdmin	Manage billing and seat operations
Editor	Edit team content and workspaces
Member	View and comment on team resources
Guest	Access explicitly shared resources only

SHARING WORKSPACES

- ▶ Mark a workspace as a team workspace to share it with all team members
 - ▶ Editors, Admins, and Owners can edit team workspace content
 - ▶ Members have view and comment access
 - ▶ Workspace deletion is restricted to the workspace owner, team admins, or team owners
-

Exporting Your Work

SUPPORTED FORMATS

FORMAT	BEST FOR	AVAILABLE IN
PDF	Professional distribution, printing, board decks	Briefs, Decisions, Frameworks
DOCX	Editable documents, team editing workflows	Briefs
PPTX	Presentations, external editing in PowerPoint	Briefing Decks
PNG	Visual exports, embedding in other documents	Decisions, Frameworks
HTML	Web publishing, CMS integration	All modes

EXPORT FEATURES

- ▶ Theme support across all formats
- ▶ Inline citations preserved in exports
- ▶ Professional formatting with page size options
- ▶ Source evidence section appended to exports

Plans and Pricing

	STARTER	PROFESSIONAL	BUSINESS	ENTERPRISE
Monthly	\$39	\$49	\$59	\$79
Annual	\$399	\$499	\$599	\$799
Seats	1	3	5	10
Free trial	14 days	-	-	-
Brief Mode	Yes	Yes	Yes	Yes
Briefing Decks	Yes	Yes	Yes	Yes
Recommendation Mode	Yes	Yes	Yes	Yes
Decision Artifacts	Yes	Yes	Yes	Yes
Framework Artifacts	Yes	Yes	Yes	Yes
Team workspaces	-	Yes	Yes	Yes
Shared business workspaces	-	-	Yes	Yes
Brand and review workflows	-	-	Yes	Yes
Azure Marketplace billing	-	-	-	Yes
Onboarding and commercial support	-	-	-	Yes

	STARTER	PROFESSIONAL	BUSINESS	ENTERPRISE
Enterprise rollout support	-	-	-	Yes

All plans include: 54 brief recipes, inline citations, number verification, source-grounded outputs, and PDF/DOCX export.

Enterprise plans are available exclusively through the Azure Marketplace or private offer.

Key Concepts

Brief Recipe — A structured template for generating a specific type of business document (e.g., Meeting Brief, Competitor Snapshot). Each recipe defines expected file types, word range, and output structure.

Source Pack — The set of uploaded documents that serve as the single source of truth for all generated artifacts. Every claim is grounded in these files.

Workspace — A container holding source documents, generated artifacts, settings, and team access controls.

Artifact — A final generated output: a brief, decision page, framework surface, or briefing deck.

Inline Citation — A numbered reference in the output linking a specific claim back to the source document and passage it came from.

Board-ready — Meets audit-grade standards. Options, criteria, confidence levels, and trade-offs are explicit, not hidden behind narrative.

Thinking Surface — A structured visual framework (2x2, funnel, pyramid) designed for spatial analysis where position encodes meaning.

Confidence Level — An indicator on decision artifacts showing how confident the analysis is in the recommendation (Low, Medium, or High).

Support

- ▶ **Website:** gixo.ai/support
- ▶ **Email:** hardikparikh@gixo.ai
- ▶ **In-app guides:** Available from the dashboard under Guides for each mode

Gixo Business is built for grounded, reviewable business work rather than quick topic-in/topic-out summaries.